Approvers in Concur

This aid will provide tips for approvers and what to look for when approving requests and expense reports. Only supervisors in PHR, fiscal officers/account managers/account supervisors in Workday and PIs are able to approve in Concur.

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General tips & information

- Travel cards (Tcards) are highly recommended because it reduces the financial burden on travelers
- Receipts attached to expenses must be itemized receipts
  - Look out for dates, vendor names, alcohol and anything that may be considered personal expenses
- When combining business and personal, **a fare comparison must be attached to the request and expense report**
- Roster lists must be attached to the request and expense report for events and group travel/group meals
  - Attendees must be added on the actual expenses for group travel/group meals
- Conference/event agendas should also be attached to requests and expense reports to determine what meals would be provided
- Encourage travelers to make adjustments to requests and expense reports themselves so they can become familiar with Concur
- If a form is returned to the traveler, it will be sent through the entire approval process again when it is resubmitted
- If a Fiscal Officer approver is assigned to be a delegate supervisor approver, 2 approvals will be required (one for each role)
- Concur will auto calculate the GSA meal per diem rate using the business travel dates listed on the request. Per Diem is the best way to handle meals. Individual meals will not be reimbursed at full cost anymore, only the per diem rate will be reimbursed
  - Buying meals on the Tcard will require more work on expense reports
    - Receipts will be required along with adding additional "offset" expense lines on top of recording per diems
  - Easiest route – Add per diem on the request, the UMD employee traveler takes care of their meals personally, then adds the per diems to their expense report after their trip
    - Receipts are not required
- The website has useful information and guides for people to use
  - **Quick Links** on the right side of the page
    - **Travel Management Company –** New travel agency to use with Concur
    - **Concur Help Center –** Includes a link to the login instructions, job aids, and support information
      - Setting up your Concur profile correctly is **very** important, please make sure to always direct people to the job aid for profile setup
    - **Concur Travel Procedures –** Information in a grid format that outlines what types of expenses are allowable and unallowable

Alerts

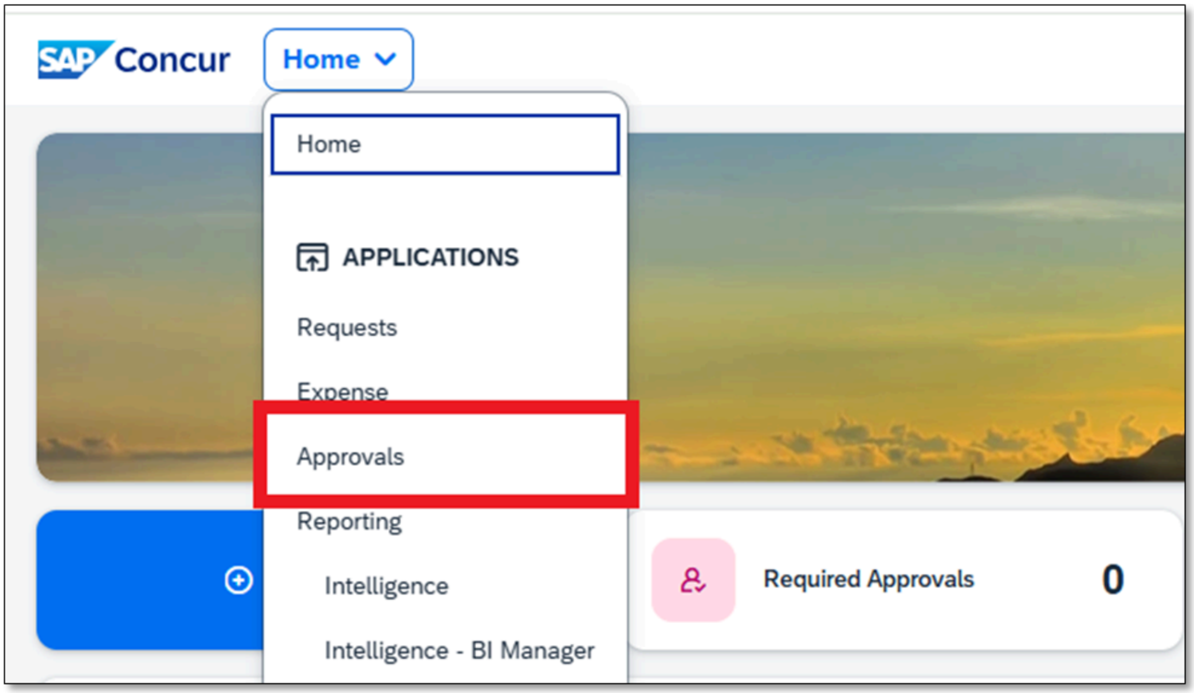
You will see 2 types of alerts on requests and expense reports.

Orange alerts are notifications that comments/dates/documentation may need to be added/corrected. Requests and expense reports can still be submitted and approved with these alerts.

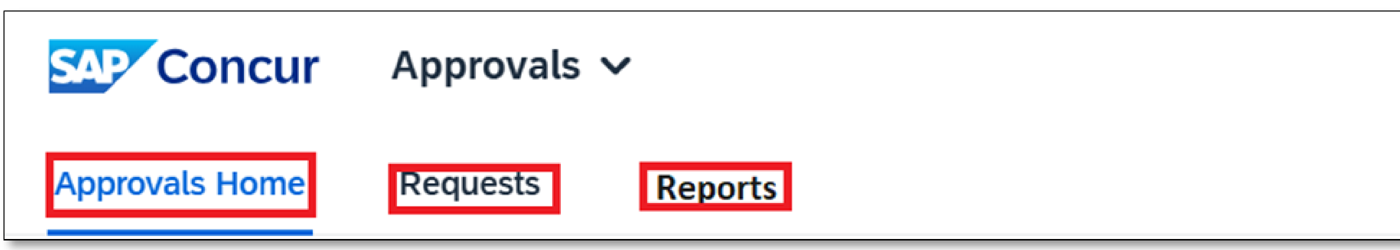
Red alerts **must** be handled before submitting/approving requests and expense reports.

How to see what is in your approval queue

1. From the Home drop down menu Click on **Approvals**



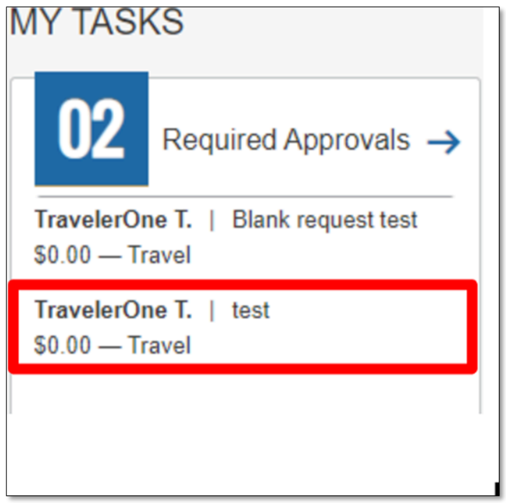
2. You can look at pending requests or expense reports by clicking on their respective tabs



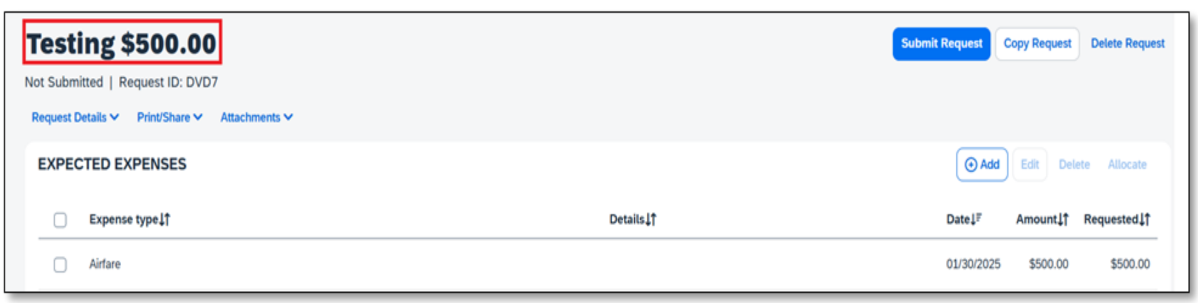
Approving Travel Requests

1. You can use the screen on the previous page or use the **MY TASKS** section after you log into Concur to see your pending items for approval.

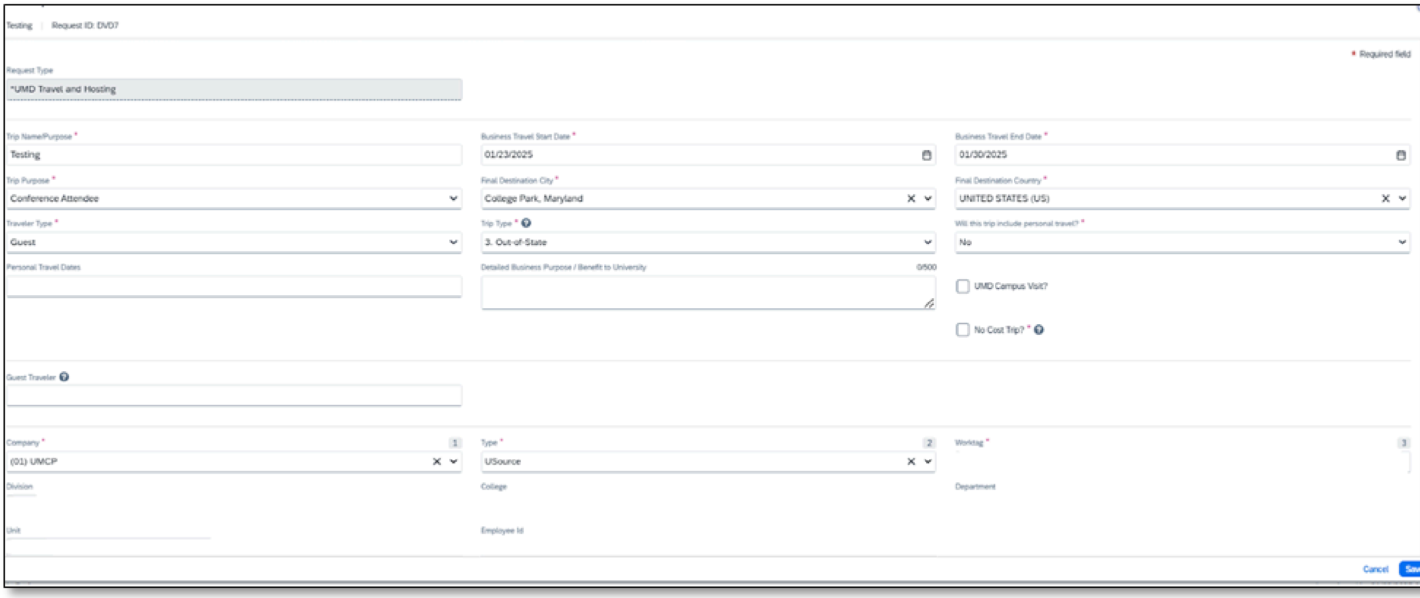
    - You can view a pending request by clicking the request you want to view



2. To view the specific travel information, click on the name of the request header

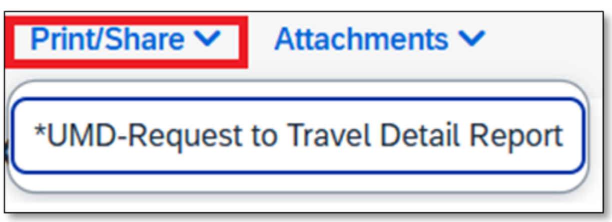


3. Once you open the request header, you can view the trip purpose, travel dates, and account details. The guest's name will be listed in the header as well if the request is for a non-employee.



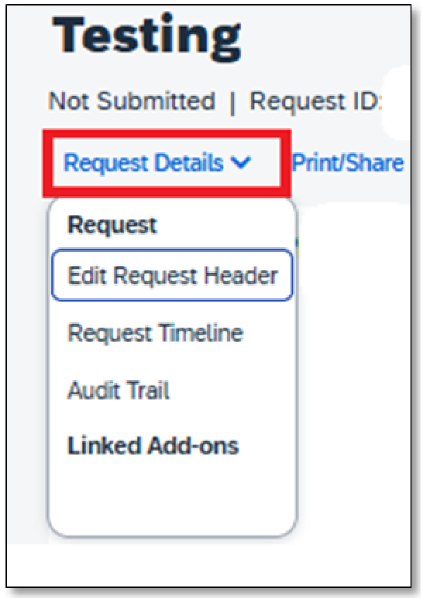
Another way to view all of the request's information is the **Print/Share** dropdown menu

1. Click the **Print/Share** dropdown menu then click ***UMD-Request to Travel Detail Report**, you will see a general summary of the entire request including comments



The Request Details

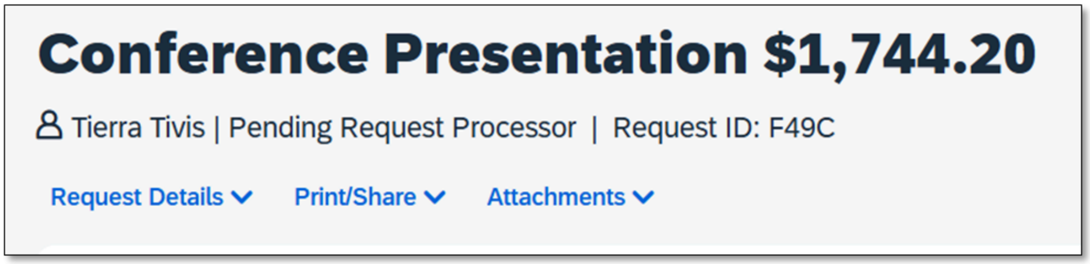
1. If you click on the **Request Details** dropdown menu you will see several options



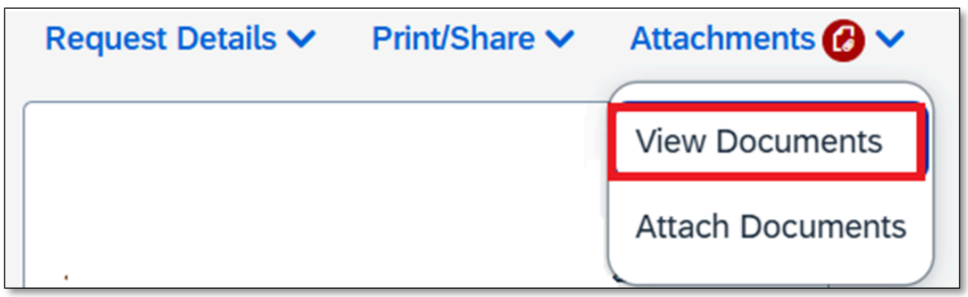
   a. **Request Header –** Shows you the request header, same as if you clicked on the request's title
   b. **Request Timeline –** Shows you a basic outline of where the request is at in workflow
   c. **Audit Trail –** A more detailed version of the Request Timeline
   d. **Allocation Summary –** Shows you all the an Account type & Worktag Number being used on the request

Viewing attached documentation on a request

1. Click the blue **Attachments** dropdown menu

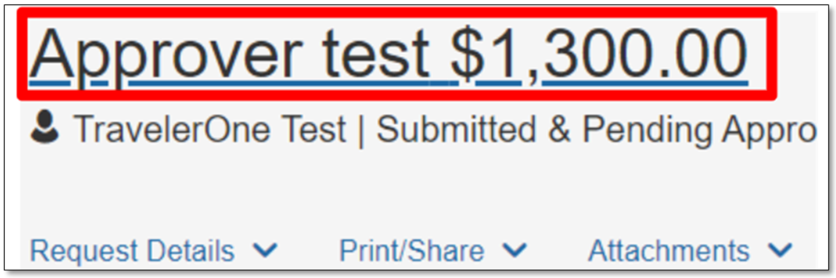


2. Click **View Documents** and you should be able to see any documentation that was attached to the request

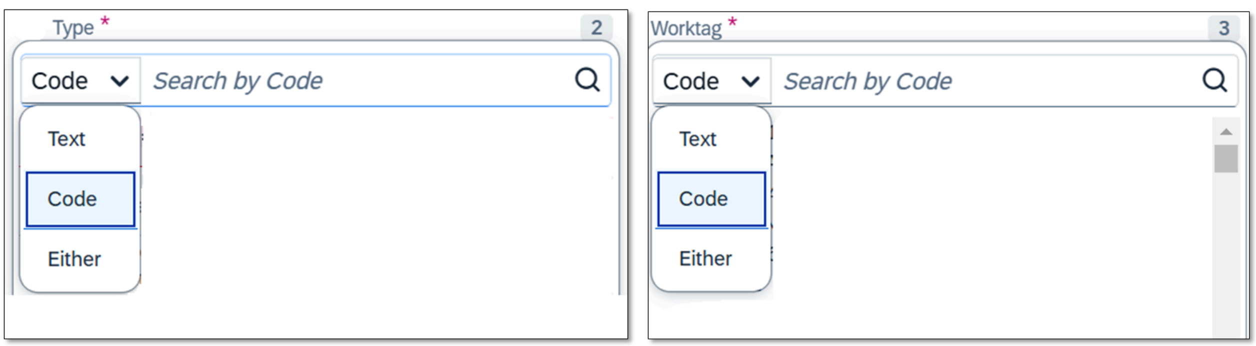


Updating an Account type & Worktag Number on the request header

1. If **all** expenses on the request need to be charged to the same Account type & Worktag Number, you can open the request header and update the Account type & Worktag Number

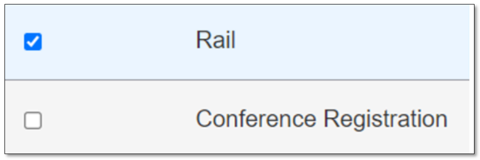


2. You can choose how to search for the Account type & Worktag Number by clicking the icon on the left. Please make sure to click the account so it is added properly into the field



Updating Account type & Worktag Number on individual expenses on requests

1. Check the boxes for the expenses you need to change the Account type & Worktag Number for
    a. You can choose multiple expenses and add/change the Account type & Worktag Number for them in one go

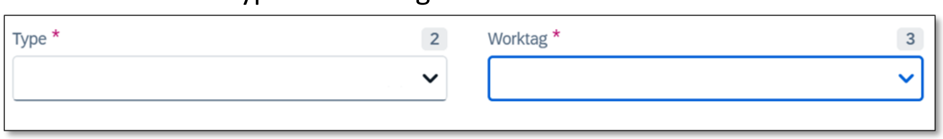


2. Click on the blue **Allocate** tab

3. Choose how you want to split the expense, by **Percentage** or **Amount**

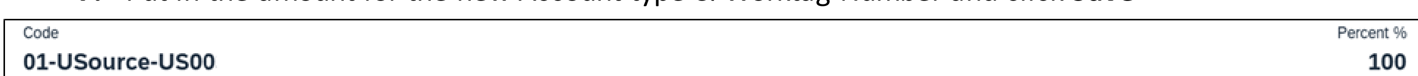
4. Click the **Add** button

5. Find and select the Account type & Worktag Number



6. Click the **Save** button

7. Put in the amount for the new Account type & Worktag Number and click **Save**



Icons on expense lines

If you hover your mouse cursor over any of these icons for each expense, a popup window will appear with the content

-  Orange alerts are there as reminders, they will not stop you from approving the expense report
    - The **Warnings and Errors** sections above the **Expenses** section shows these alerts as well

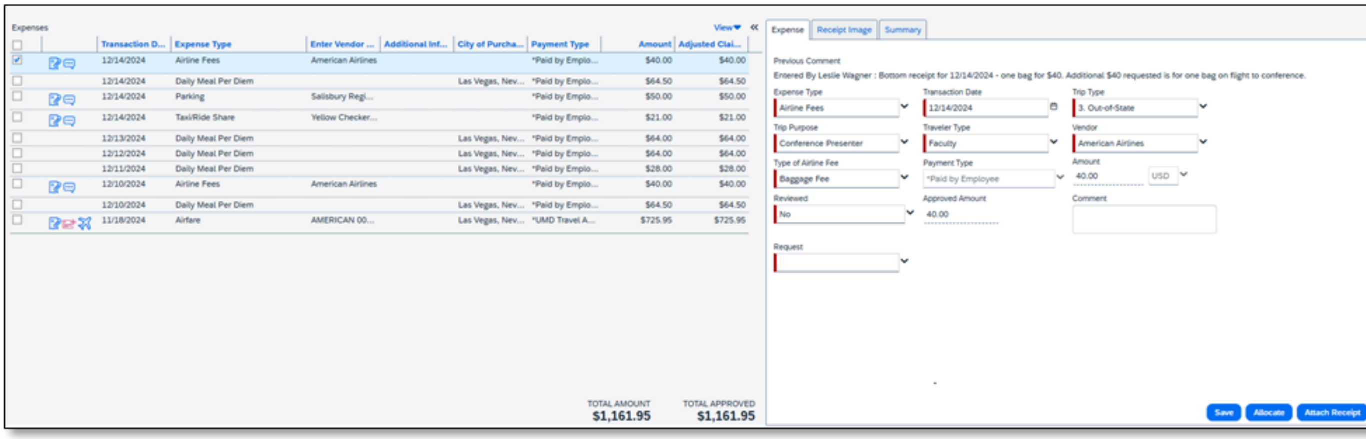
-  Shows you the receipt for the expense

-  Shows the allocation for the expense if it's been edited/changed

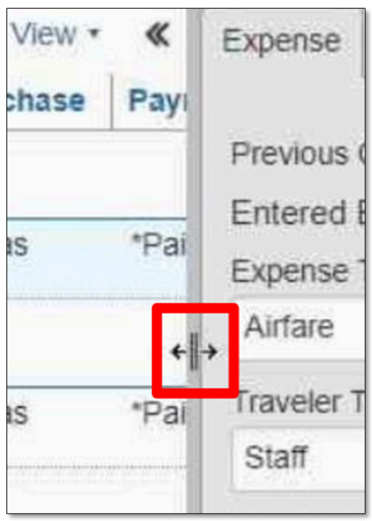
-  Shows any comments that were included on the expense

Viewing expenses on expense reports

1. Click on an expense line and the information for it will populate the section on the right



2. You can resize the gray section by clicking and dragging between the white and gray sections



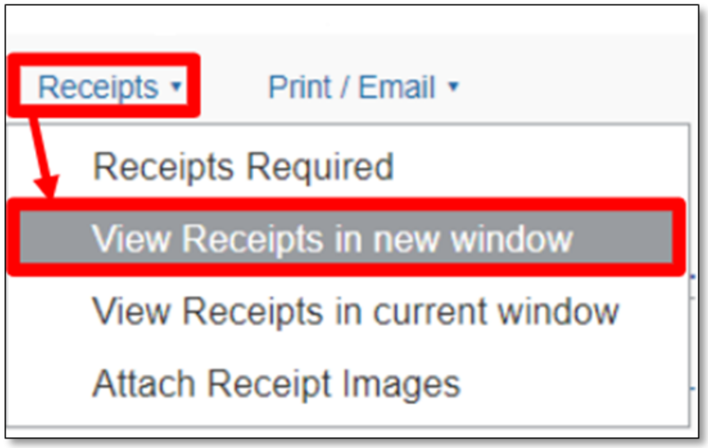
3. Clicking the double arrow icon will widen the gray section to the width of the page

4. You can change the width of the columns for the expenses by clicking and dragging the lines next to the column names

Viewing attached documentation on expense reports

1. Click the **Receipts** dropdown menu and click **View Receipts in new window**
   Note: This will show all documentation that was attached by the employee.

- Ex. Roster list, conference agenda, fare comparisons, etc.

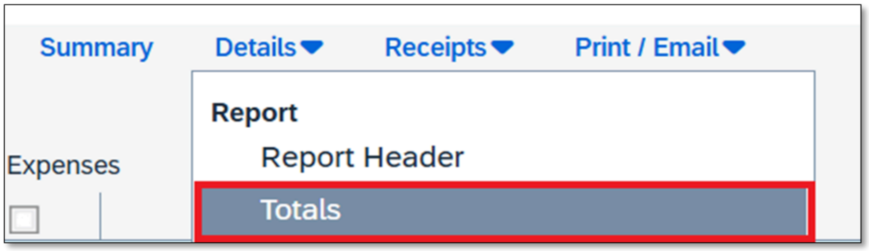


Print/Email dropdown menu

1. This dropdown menu is identical to the Print/Share menu on requests besides the naming

Report Totals

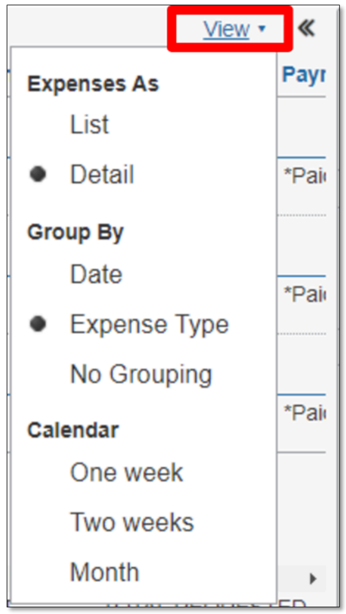
1. You are able to view the totals for the expense report by clicking **Details** and **Totals**



2. **Company Disbursements**
   - **Amount Due Employee –** Amount the traveler will be reimbursed
   - **Amount Due *UMD Tcard –** Amount charged to the Tcard
   - **Amount Due *UMD Travel Agent Card –** Amount charged to UMD ghost card
3. **Employee Disbursements –** Amount owed to the university

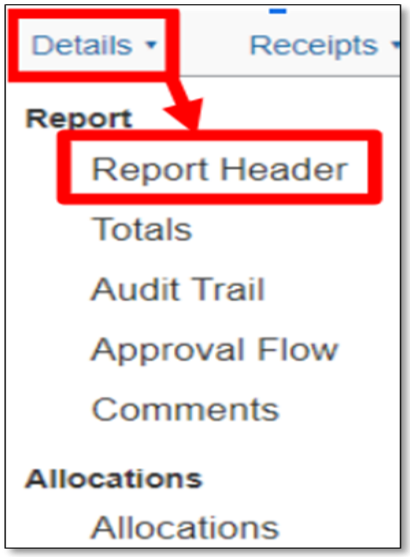
Sorting expenses

1. Click the **View** dropdown menu and sort the expenses how you want them

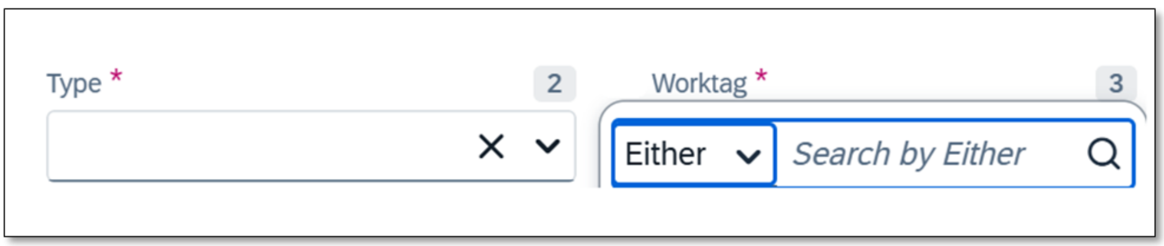


Updating an Account type & Worktag Number on the expense report header

1. Click the **Details** dropdown menu and click **Report Header**

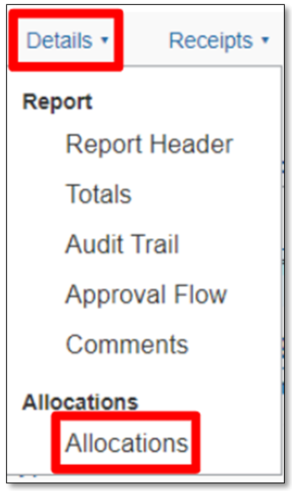


2. Search and select the Account type & Worktag Number you want to use

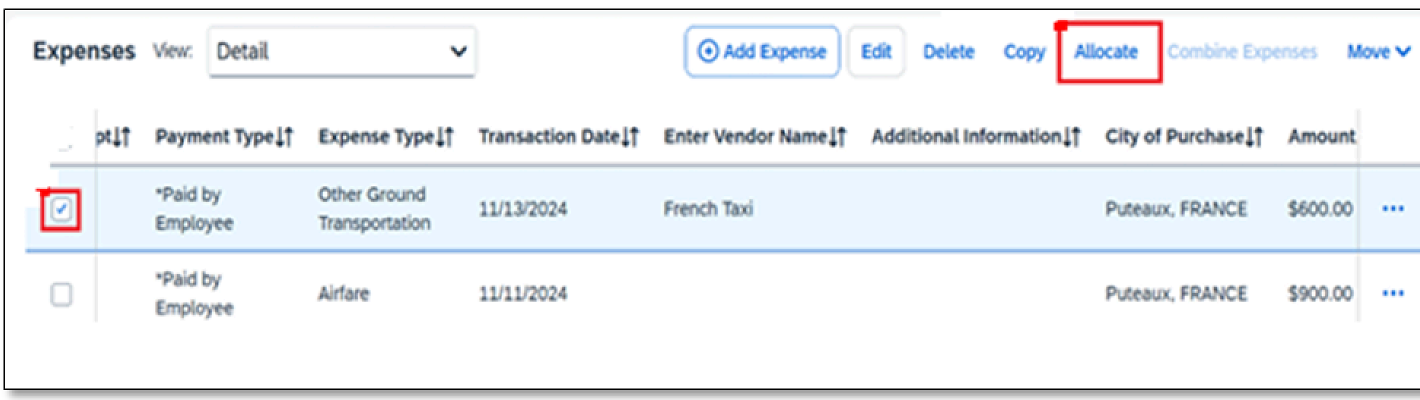


Updating an Account type & Worktag Number on individual expenses on expense reports

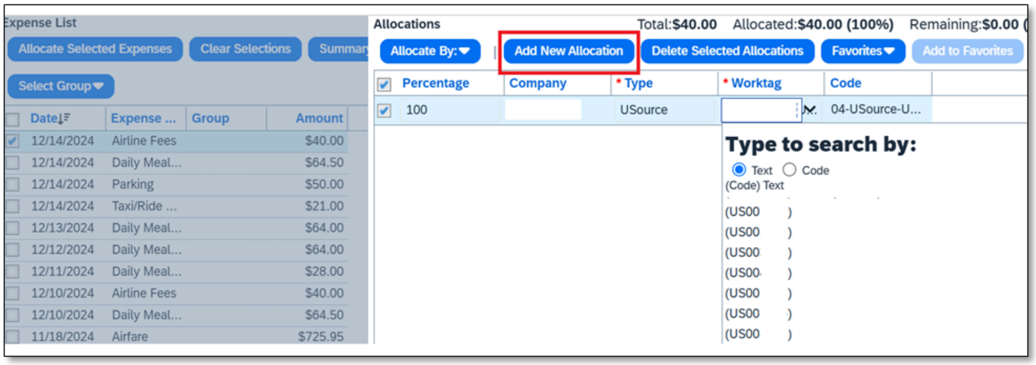
1. Click the **Details** dropdown menu and click **Allocations**



2. Select the expense(s) you want to edit by checking the box for the expense(s) then click the blue **Allocate** tab



3. Click the **Add New Allocation** button. You can click this multiple times to add more lines if you need to add multiple Account types & Worktag Numbers. Search for and select the Account type & Worktag number you need.



4. Click **Save** once you are done

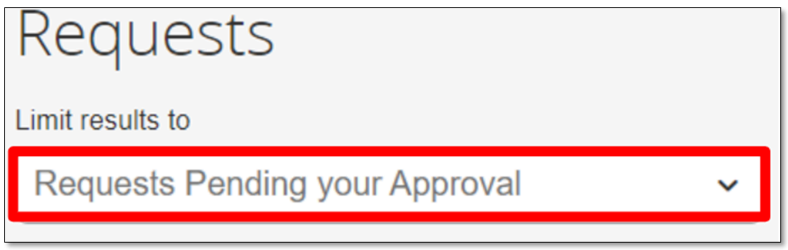
5. You can click the **Summary** button to make sure your new allocations were saved

How to look up previously approved requests and expense reports

1. After clicking **Approvals** at the top header, click on **Requests or Reports** in the white header

2. Use the drop-down menu to filter out how far back you want to go

Requests



Expense Reports